



Catalog Manager User Manual

PayPort™ conveniently enables your agency to accept Discover, MasterCard and VISA payments from customers who pay in person, by fax, or by telephone for virtually any type of sales transaction.

This manual illustrates how to set up and manage your customizable credit/debit card processing system.

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Section 1: Help Contacts

For PayPort questions or assistance, please contact Access Idaho:

PHONE: Boise Area: 208-332-0102
Toll free: 1-877-4ID-EGOV (1-877-443-3468)
(Business days from 8 am-5 pm MT)

EMAIL: support@accessidaho.org

MAIL: Access Idaho
999 W. Main St., Ste. 910
Boise, ID 83702-9010

Section 2: Logging into the AcID Framework Online Administration System

The web address for the AcID Framework secure login page is:

<https://www.accessidaho.org/framework/manager.html>

Add this web page to your favorites list for easy reference.

Access Idaho.' At the bottom is a 'New Users' section with the text: 'To use this service you will need a username and password supplied by Access Idaho.' and a blue link: 'Create A New User Account'."/>

AcID Framework

Framework Login

Registered Users

Username: [forgot username?](#)

Password: [forgot password?](#)

* Username and password are case sensitive.

If you are unable to access this application with your current username and password, please contact [Access Idaho](#).

New Users

To use this service you will need a username and password supplied by Access Idaho.

[Create A New User Account](#)

Note: The first time you log into the AcID Framework, you may be prompted to change your password to one of your choosing. Passwords are case-sensitive, must be at least 5 characters long, and can contain numbers, letters, and/or symbols. For security purposes, do not allow your web browser (Internet Explorer, Netscape, etc.) to remember your login information.

Section 2: Logging into the AcID Framework Online Administration System

After logging in successfully, you will see the screen below (your Manager Options list may differ slightly):

The screenshot displays the Idaho Administrative Tools web interface. The header includes the 'IDAHO' logo and 'Online Services' link. The left navigation menu lists various categories: About Idaho, Business, Education, Jobs & Labor, Government, Health & Family, Laws & Rules, and Tourism & Transportation. The main content area is titled 'Administrative Tools' and shows a status bar with system information: '[beta] Application Server Quick Stats', '01/03/2005 11:46 AM up 4 days, 19:40:32.193', 'logged in user: PayPort Administrator', 'pages served: 150', and 'free memory: 44,128K / 111,568K (39.55% free)'. Below this is a 'Manager Options' section with a list of tools: 'Billing System', 'Portal', 'Authenticate Secure Document', 'Calendar Administration', 'Display Current User Information', 'PayPort Catalog Manager', 'PayPort Clerk Report', 'PayPort Financial Officer Report', and 'Log Out'. A red bracket groups the 'PayPort Catalog Manager', 'PayPort Clerk Report', and 'PayPort Financial Officer Report' links, with a note stating: 'Appears at the bottom of each page for easy navigation.'

PayPort Management Tools

- [Authenticate Secure Document](#)
- [Calendar Administration](#)
- [Display Current User Information](#)
- [PayPort Catalog Manager](#)
- [PayPort Clerk Report](#)
- [PayPort Financial Officer Report](#)
- [Log Out](#)

Appears at the bottom of each page for easy navigation.

Section 3: Preparing to Set Up Catalogs

You must create catalogs first. Your agency's clerks will not be able to log-in until you associate their usernames with at least one catalog. Also, your financial reports cannot be accessed without at least one catalog associated with your account.

Step 1. Make a master list of items you would like to sell.

Example Master List:

- Filing
- Amended Filing
- Batch Filing
- Fines
- Photocopies
- Professional License Renewal
- License Verification Request
- Permit
- Duplicate License
- Late Fee
- Continuing Education Course
- Recording Fee
- Processing Fee
- Shipping
- Document Order
- Document Search
- PayPort Mug
- PayPort T-Shirt
- Professional Manual
- Diskette/CD
- Fax
- Mailing List
- Labels

Step 2. If applicable, organize your list into catalog types (see below).

Step 3. Assign each item a unique catalog number (all numbers, all letters, or alphanumeric) that is easy for clerks to type in.

NOTE: *Catalog numbers cannot be changed or deleted.*

Documents	Licensing & Permitting	Merchandise
100. Document Request	200. License Renewal (ID)	300. T-Shirt, X-Small (Tax)
101. Document Search	201. License Renewal (Non-ID)	301. T-Shirt, X-Small (No Tax)
102. Filing	202. License Duplicate	302. T-Shirt, Small (Tax)
103. Amended Filing	203. License Verification	303. T-Shirt, Small (No Tax)
104. Copies	204. Continuing Ed Course	304. T-Shirt, Med. (Tax)
105. Diskette/CD	205. Professional Manual	305. T-Shirt, Med. (No Tax)
106. Batch Filing	206. Permit (ID)	306. T-Shirt, Large (Tax)
107. Recording Fee	207. Permit (Non-ID)	307. T-Shirt, Large (No Tax)
108. Processing Fee	500. Fines	308. T-Shirt, XL (Tax)
800. Fax	600. Late Fee	309. T-Shirt, XL (No Tax)
900. Shipping (USPS)	700. Mailing List	400. PayPort Mug (Tax)
901. Shipping (2-day Air)	750. Labels	401. PayPort Mug (No Tax)
902. Shipping (Overnight)	800. Fax	900. Shipping (USPS)
	900. Shipping (USPS)	901. Shipping (2-day Air)
	901. Shipping (2-day Air)	902. Shipping (Overnight)
	902. Shipping (Overnight)	

The same item can be listed in more than one catalog.

Section 4: Adding a New Catalog

Add a new catalog only after you have determined what items you would like in it (please see Section 3 for recommended organizational steps).

Step 1. Select “PayPort Catalog Manager” link.

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Administrative Tools

[beta] Application Server Quick Stats 01/03/2005 11:46 AM up 4 days, 19:40:32.193

logged in user: PayPort Administrator
pages served: 150
free memory: 44,128K / 111,568K (39.55% free)

Manager Options

- Billing System
- Portal
 - Authenticate Secure Document
 - Calendar Administration
 - Display Current User Information
 - PayPort Catalog Manager
 - PayPort Clerk Report
 - PayPort Financial Officer Report
- Log Out

This link allows you to:

- Add Catalogs
- Edit Catalogs
- Print Catalogs
- Manage Users
- Manage Groups
- Enter Sales Data
- Search/Print Receipts

Step 2. Enter desired catalog name and select “Create.”

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PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipts]

Edit Catalogs: [Documents] [Licensing & Permitting] [Merchandise]

New Catalog: [Documents] [Create]

[beta] Application Server Quick Stats 01/03/2005 12:06 PM up 4 days, 20:00:33.190

logged in user: PayPort Administrator
pages served: 152
free memory: 44,281K / 111,568K (39.69% free)

Manager Options

- Billing System

By default, PayPort Administration begins with the “Edit Catalogs” section.

Give each catalog its own unique name.

Section 5: Editing Catalogs

The “Edit Catalogs” feature allows you to add new catalogs and modify existing ones.

Step 1. Select the “New Item” button to enter item information.

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Over the Counter Credit Card Administration

[Edit Catalogs] [Print Catalogs] [Manage Users] [Manage Groups] [Required Sales Data] [Receipt]

Edit Catalogs: [Documents] ← *Catalog name*

Documents catalog

New Item ← *Select to add items.*

No catalog items found.

Step 2. Enter item information.

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PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

Edit Catalogs: [Documents] [Licensing & Permitting] [Merchandise]

[New Item] Item saved. ← *After clicking the “Save” button, a confirmation message appears.*

Catalog Number (must be unique): 100 ← *Catalog Numbers can be all numbers, all letters, or alphanumeric.*

Name: Document Request

Description: Document Request

Price (leave blank if variable): \$10.00

Sales Tax Exempt: ☒

Quantity Discounts Other Options Save

← *Click here to enter more item information (see next page).*

Section 5: Adding a New Catalog Item

Step 3. The “Other Options” button (see previous page) allows you to change item variables.

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PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

[<<< back to item page](#)

100 - Document Request

Minimum Quantity:

Maximum Quantity:

Include note field (not searchable): ☒

Include in these catalogs:

☒ Documents

☐ Licensing & Permitting

☐ Merchandise

Default amounts

Displays a field in the transaction screen to enter additional detail about an item (e.g. license number, document type, description, etc.)

When other catalogs are created, you have the option of adding the same item to them too by selecting their boxes.

Step 4. The “Quantity Discount” button allows you to set different pricing levels based on the number of items ordered.

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PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

Edit Catalogs: [Documents] [Licensing & Permitting] [Merchandise]

[[New Item](#)]

Catalog Number (must be unique):

Name:

Description:

Price (leave blank if variable): \$

Sales Tax Exempt: ☒

Step 5. Enter information for a pricing tier (include decimal for cents).

About Idaho

Business

Education

Jobs & Labor

Government

Health & Family

Laws & Rules

Tourism & Transportation

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

<<< back to item page

104 - Document Copies

Quantity Discount:

Purchasing

1

results in the reduced price of \$

.25

Amount

Price

variable

Update

Done

Enter lowest quantity of a tier level and its price.

Step 6. The “Update” button sets the parameters for that tier.

About Idaho

Business

Education

Jobs & Labor

Government

Health & Family

Laws & Rules

Tourism & Transportation

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

<<< back to item page

104 - Document Copies

Quantity Discount:

Purchasing

results in the reduced price of \$

Amount

Price

1 - 1000

\$0.25

[remove]

Update

Done

Maximum quantity is defined in “Other Options” screen (please see previous page)

Step 7. Add another pricing tier.

About Idaho

Business

Education

Jobs & Labor

Government

Health & Family

Laws & Rules

Tourism & Transportation

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

<<< back to item page

104 - Document Copies

Quantity Discount:

Purchasing

50

results in the reduced price of \$

.15

Amount

Price

1 - 1000

\$0.25

[remove]

Update

Done

Next level of quantity discount and its associated price

Step 8. The “Update” button automatically adjusts for the new parameters.

About Idaho

Business

Education

Jobs & Labor

Government

Health & Family

Laws & Rules

Tourism & Transportation

PayPort Catalog Manager

[Edit Catalogs]

[Print Catalogs]

[Manage Groups]

[Manage Users]

[Required Sales Data]

[Receipt]

<<< back to item page

104 - Document Copies

Quantity Discount: Purchasing results in the reduced price of \$

Amount	Price
1 - 49	\$0.25 [remove]
50 - 1000	\$0.15 [remove]

Update

Done

Tier levels adjusted to new pricing variable

Example of a completed pricing structure for an item with a quantity discount:

About Idaho

Business

Education

Jobs & Labor

Government

Health & Family

Laws & Rules

Tourism & Transportation

PayPort Catalog Manager

[Edit Catalogs]

[Print Catalogs]

[Manage Groups]

[Manage Users]

[Required Sales Data]

[Receipt]

<<< back to item page

104 - Document Copies

Quantity Discount: Purchasing results in the reduced price of \$

Amount	Price
1 - 49	\$0.25 [remove]
50 - 74	\$0.15 [remove]
75 - 99	\$0.20 [remove]
100 - 199	\$0.10 [remove]
200 - 1000	\$0.05 [remove]

Update

Done

“Print Catalog” View

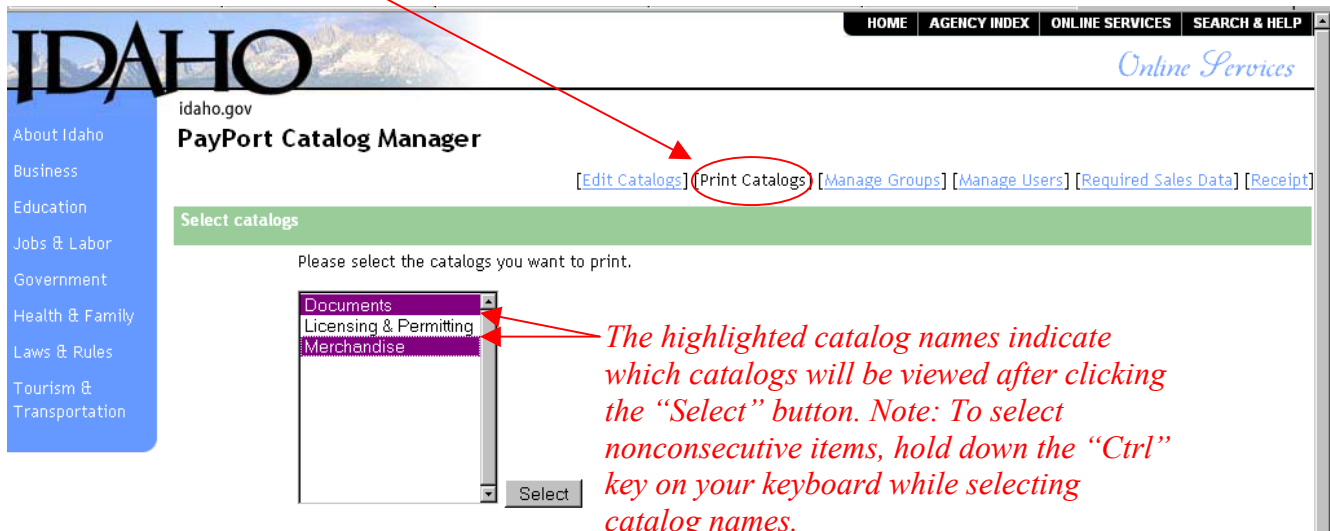
104	Document Copies	1 - 49	\$0.25	exempt
		50 - 74	\$0.15	
		75 - 99	\$0.20	
		100 - 199	\$0.10	
		200 - 1000	\$0.05	

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Section 6: Printing Catalogs

Step 1. The “Print Catalogs” button displays and/or prints one or more catalogs.



The screenshot shows the PayPort Catalog Manager interface. The 'Print Catalogs' button is circled in red. A list of catalogs is shown with 'Documents', 'Licensing & Permitting', and 'Merchandise' highlighted. A red arrow points from the 'Print Catalogs' button to the highlighted list.

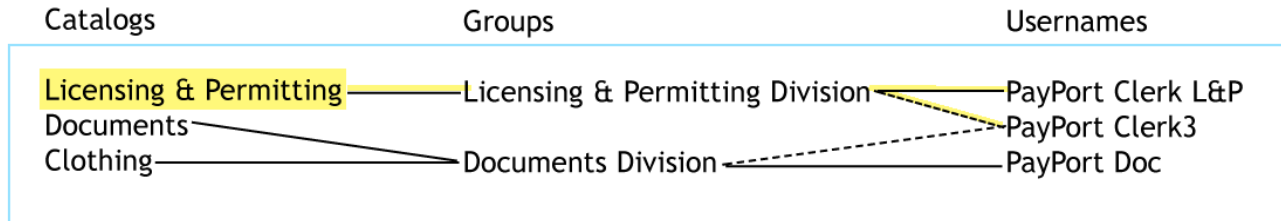
The highlighted catalog names indicate which catalogs will be viewed after clicking the “Select” button. Note: To select nonconsecutive items, hold down the “Ctrl” key on your keyboard while selecting catalog names.

Step 2. After printing your selected catalog list(s) (example below), use your browser’s back arrow button to return to the PayPort administration page.

Catalog Number	Description	Price	Sales Tax
100	Document Request	\$10.00	exempt
900	Shipping (Regular USPS Delivery)	variable	exempt
101	Document Search	\$3.00	exempt
102	Document Filing	\$3.00	exempt
103	Amended Filing	\$3.00	exempt
104	Document Copies	1 - 49 \$0.25 50 - 74 \$0.15 75 - 99 \$0.20 100 - 199 \$0.10 200 - 1000 \$0.05	exempt
105	Diskette/CD	\$5.00	exempt
106	Batch Filing (XTML)	25 - 0 \$4.00 1 - 24 \$4.00 25 - 9999999999 \$4.00	exempt
107	Recording Fee	\$7.50	exempt
108	Processing Fee	\$10.50	exempt
800	Fax (per page)	\$0.50	exempt
901	Shipping (2-Day Air)	\$7.50	exempt
902	Shipping (Overnight)	\$15.00	exempt
300	PayPort T-Shirt, X-Small (taxable)	\$9.95	

Section 7: Managing Groups

Because catalogs and users are both assigned to groups, you can easily control user access to catalogs.



The diagram above illustrates that PayPort Clerk 3 belongs to both Groups (Licensing & Permitting Division and Documents Division), which allows the clerk to access all three catalogs.

Selecting the “Manage Groups” link allows you to create new groups and edit existing ones.

The screenshot shows the 'PayPort Catalog Manager' web application. At the top, there is a navigation bar with links: HOME, AGENCY INDEX, ONLINE SERVICES, and SEARCH & HELP. Below this is the 'IDAHO' logo and the text 'idaho.gov'. The main heading is 'PayPort Catalog Manager'. A red arrow points from the text 'Selecting the “Manage Groups” link allows you to create new groups and edit existing ones.' to the 'Manage Groups' link in the navigation bar. Below the heading, there are links: [Edit Catalogs], [Print Catalogs], [Manage Groups], [Manage Users], [Required Sales Data], and [Receipt]. A green bar labeled 'Select group' contains the text 'Please select the group you want to edit.' and a list of links: PayPort Agency, Documents Division, Licensing & Permitting Division, Clerks, and Merchandise. A red bracket groups these links with the text: 'Selecting an existing group name allows you to view and edit which catalogs are associated with it (see next page).' Below this is another green bar labeled 'Create new group' with the text 'Please enter the name of the group you want to create.' and a form with a 'Group Name:' label, a text input field, and a 'Create' button. A red arrow points from the text 'To add a new group, simply type the desired group name and select the “Create” button.' to the 'Create' button.

Editing a Group. Select the boxes next to the catalog names you would like associated with a group and select “Save.” To deselect a catalog, click on its check mark (it will disappear) and hit “Save.”

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PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

Edit Group

Editing Merchandise group [change]

☐ Documents

☐ Licensing & Permitting

☒ Merchandise

Save

Selecting this link allows you to view and edit other groups.

Note: Groups cannot be deleted in PayPort. If you do not want to use a particular group, make sure no catalogs are associated with it.

Section 8: Managing Users

Selecting the “Manage Users” link allows you to edit receipt text, change inactivity timeouts, and associate users with a group. **Note: Users cannot use PayPort unless they are associated with at least one group.**

Step 1. Select a username to edit parameters for that user.

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] **[Manage Users]** [Required Sales Data] [Receipt]

Manage Users

Select a user to edit.

PayPort Administrator	Warren Peece
PayPort Clerk1	Weldon Rumpoast
PayPort Clerk2	Tara Bull
PayPort Bookkeeper	Franklin Mint
PayPort Doc	Lee Gull
PayPort Clerk3	Donna Teller
PayPort Clerk4	Les Filling
PayPort Clerk5	Ray Gunn
PayPort L&P	Troy Ounce

Usernames (listed alphabetically)

If any of your agency's users do not appear here, please contact Access Idaho.

Step 2. Edit user parameters and use the “Save” button to apply changes.

Example. Managing user “PayPort Clerk2:”

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

Edit User

Editing user: **PayPort Clerk2** [change](#).

Receipt Text: **Sale by Tara Bull**

Time Out (in minutes): **15**

Default to Phone Orders: ☐

Group Membership:

- ☐ PayPort Agency
- ☐ Documents Division
- ☐ Licensing & Permitting Division
- ☒ Clerks
- ☐ Merchandise

Save

This link allows you to view and edit other users.

Customize receipt messages for each user.

After the designated time of inactivity, users will need to log back in.

For added security, users cannot create a transaction unless associated with at least one group.

Section 9: Required Sales Data

The “Required Sales Data” link allows you to control which transaction fields are hidden, shown but optional, required when credit/debit card is not present, or always required.

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PayPort Catalog Manager

[\[Edit Catalogs\]](#) [\[Print Catalogs\]](#) [\[Manage Groups\]](#) [\[Manage Users\]](#) [\[Required Sales Data\]](#) [\[Receipt\]](#)

Required Sales Data

Please select the fields you wish to display or require.

Required when Card Not Present	Billing address
Show, But Optional	Mailing address
Show, But Optional	Email address
Hide	Fax number
Show, But Optional	Phone number
Hide	Comment field

Options available for every field.

Drop-down menus reveal options.

After editing, click here to apply changes.

Save

Sample sales data Clerk screen:

Logged in as: PayPort Clerk3 [Logout](#)

Purchases [Find Receipt](#)

Transaction Type ☐ Over the Counter ☒ Card Not Present

Order Number

* = required information

Billing Address

Address*

City*

State*

Zip Code*

Ship To ☒ none ☐ same as billing ☐ shipping address below

Shipping Address

Full Name

Address

City

State

Zip Code

Phone

Email

Section 10: Receipt

The “Receipt” link allows you to customize the information at the top (header) and bottom (footer) of your receipts.

The screenshot shows the 'PayPort Catalog Manager' interface. At the top, there is a navigation bar with links: HOME, AGENCY INDEX, ONLINE SERVICES, and SEARCH & HELP. Below this, the 'idaho.gov' logo is visible, along with the title 'PayPort Catalog Manager'. A sidebar on the left lists various categories: About Idaho, Business, Education, Jobs & Labor, Government, Health & Family, Laws & Rules, and Tourism & Transportation. The main content area is titled 'Receipt' and contains a green header bar. Below the header bar, there is a text input field for the receipt header, followed by a 'Header' section with a text area containing the following text: 'PayPort Agency', '999 W. Main St., Ste. 910', 'Boise, ID 83702-9011', and 'Phone: (208) 332-0102'. Below this is a 'Footer' section with a text area containing 'Thanks for your order!' and a 'Signature:' field. A 'Save' button is located at the bottom of the form. A red arrow points from the 'Receipt' link in the top navigation bar to the 'Receipt' link in the main content area. Another red arrow points from the 'Save' button to the text 'Don't forget to click here to apply your changes.' A red bracket on the right side of the form indicates a '2000 character limit (no more than 80 lines) in each field'.

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PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

Receipt

Please enter the text you wish to appear on your receipt.

Header

PayPort Agency
999 W. Main St., Ste. 910
Boise, ID 83702-9011
Phone: (208) 332-0102

Footer

Thanks for your order!

Signature: _____

Save

Don't forget to click here to apply your changes.

*2000 character limit
(no more than 80 lines)
in each field*

Section 10: Receipt

PayPort On-screen Receipt Example (does not display header or footer):

Transaction ID (receipt number)

Your agency's order number (optional)

Credit/debit card number

Entered in "Note" field—not searchable (Section 5, Step 3)

Entered in "Comment" field on Clerk's transaction screen—searchable

Billing/shipping/contact info

Transaction stage indicator

Purchases | Find Receipt |

Receipt
3169 - Card Present Transaction
Order #787659; 01/07/2005 12:59 PM

Visa XXXX XXXX XXXX 2301
Your credit card statement will indicate that Access Idaho has billed you for:

Item	Price	Qty	Comment	
Document Filing	\$ 3.00	1		\$ 3.00
License Duplicate	\$ 5.00	1		\$ 5.00
Shipping (Regular USPS Delivery)	\$ 1.87	1	Postage to Denver	\$ 1.87
Subtotal				\$ 9.87
Sales Tax				\$ 0.00
Processing Fee				\$ 1.30
Total				\$ 11.17

For license #48938205
Billing Address
Simple Simon
P.O. Box 1060
Firth, ID 83236
v:303-555-1212
simplesimon@pie-man.com

Shipping Address
Simple Simon
1200 W. Main Street
Denver, CO 80220

1 2 3 4 5

New Transaction Print

PayPort **Printed Receipt** Example:

PayPort Agency
999 W. Main St., Ste. 910
Boise, ID 83702-9011
Phone: (208) 332-0102

3152 - Card Present Transaction
Order #787659
Sale by Donna Teller

Visa XXXX XXXX XXXX 2301
Your credit card statement will indicate that Access Idaho has billed you for:

For license #48938205
Document Filing
License Duplicate
Shipping (Regular USPS Delivery)

1 @	3.00	3.00
1 @	5.00	5.00
1 @	1.87	1.87
Subtotal:		\$ 9.87
Sales Tax:		\$ 0.00
Processing Fee:		\$ 1.30
Total:		\$ 11.17

Simple Simon
P.O. Box 1060
Firth, ID 82639
ph: 208-555-9282 simplesimon@pie-man.com
Thanks for your order!

Signature: _____

Header

Internal order number (optional)

Receipt text (Section 8, Step 2)

Items

Comment (searchable)

Billing information

Footer

Page 1 of 1